FAS REPORT

United States
Department of
Agriculture
Foreign
Agricultural
Service
Washington, D.C. 20250

WASHINGTON, April 7--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following recent developments in world agriculture and trade:

GRAIN AND FEED

In CHINA, poor moisture conditions last fall in some important grain producing provinces delayed sowing, and cold temperatures over most of the North China Plain retarded early crop development. Mild temperatures in December improved crop conditions, but moisture supplies were still quite low. Unirrigated grains, which broke dormancy in late February, are now under stress. Winter wheat and barley area in China is down again this year, continuing a trend which began in 1979. The decrease in area is believed to be smaller than in the past 2 years. Recently, farmers have had more freedom in farm management, encouraging diversification of cropping patterns. As a result, farmers have shifted from grains to more profitable cash crops, such as winter rapeseed. Unless April rains are normal, the reduced sown area and low moisture reserves will likely result in a 1982 wheat crop below the estimated 57.5 million tons produced in 1981.

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The SOVIET UNION recently released final 1981 (and revised 1980) harvested crop area statistics. Following is a summary of the data in million hectares:

Year	Wheat	Barley	Total Grain 1/	Cotton	Processing Sugar Beets	Sun flowerseed
1980	61.5	31.6	126.6	3.1	3.7	4.4
1981	59.2	31.8	125.6	3.2	3.6	4.2

1/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

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In GREECE, durum area is expanding at the expense of soft wheat because of the European Community's wheat policy that encourages expansion of durum, which is currently in deficit. Consequently, Greek farmers have responded by sowing approximately 8 percent more durum for 1982 harvest, while soft wheat sowings have declined roughly 3 percent. It also appears that barley area will be lower for both winter and spring varieties, possibly due to shifts to durum.

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INDIA's 1982 wheat production is forecast to rise 3 percent above last year's record high 36.5 million tons, according to the U.S. agricultural counselor in New Delhi. This year's area sown to wheat is believed to have changed little from last year's near record 22.1 million hectares. This is due to producer expectations of a minimum support price of $157.77 per ton, which was set high in order to keep area up. Barley area is expected to be virtually unchanged from last year's level of 1.8 million hectares. Rain, wind and hail during the last week of February and early March caused some localized lodging, and there have been several more periods of thunderstorms as harvesting moved into full swing. However, much of the crop is harvested by hand and volume should not be seriously affected. Quality, however, was probably reduced in some areas.

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OILSEEDS AND PRODUCTS

EGYPT's consumption of vegetable oil in 1981 rose by 16 percent following average annual growth of only about 2 percent during 1977-80, according to the U.S. agricultural counselor in Cairo.

Egypt's recent annual vegetable oil production, imports, and consumption are as follows in 1,000 tons:

Item	1977	1978	1979	1980	1981
Production	91	104	117	133	146
Imports	278	281	286	262	313
Apparent consumption	369	385	403	395	459

The bulk of domestic production is cottonseed oil, although small quantities of soybean oil are also produced. During 1977-81, growth in imports of vegetable oil accounted for nearly two-fifths of the growth in consumption. The United States was a major supplier, as were Brazil, Spain, Romania, Argentina, and the Netherlands. Egypt's vegetable oil imports in 1981 and the U.S. share were as follows:

Item	Total Imports (In 1,000 MT)	U.S. Share (In percent)
Cottonseed oil	173.3	47
Soybean oil	91.7	14
Sunflower oil	47.4	46

In addition to growing import requirements for vegetable oil, Egypt imported 18,700 tons of U.S. soybeans in 1981 and about 20,000 tons of soybean meal for use in poultry feed.

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DAIRY, LIVESTOCK, AND POULTRY

In CHILE, sharply increased dairy production during 1981 caused milk prices to decline 25 percent compared with 1980, according to the agricultural attache in Santiago. Cow milk production in 1981 is currently estimated at 1.18 million tons, approximately 13 percent above 1980. Economic stability and attractive prices for the past several years have caused farmers to expand their dairy herds. The larger herds, plus a favorable feed situation in 1981, caused the rapid increase in milk production.

Responding to the lower milk prices, farmers culled their dairy herds, adding to the surplus of slaughter cattle and forcing meat prices down further. The surplus milk situation is not expected to be relieved until normal seasonal declines in milk production in mid-1982.

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The EUROPEAN COMMUNITY recently released its preliminary estimates for the December 1981 census of cattle numbers. Estimates for cattle--at 77.2 million head--were down 1.3 percent from December 1980. Total cows were down about 1 percent, and beef cows, which account for about 19 percent of all cows were down about 2 percent. Dairy cows were down about 1 percent. The largest declines in cattle numbers occurred in France, down 3.3 percent, and Greece, down almost 5 percent.

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Pork production in HONG KONG continues to increase, currently accounting for about 90 percent of total red meat production. The U.S. agricultural officer in Hong Kong estimates that pork production for 1982 will rise 5 percent to 187,000 tons. Since 1979, slaughter of domestically raised hogs has dropped about 14 percent, while pork production over the same period has grown by about 5 percent due to a 10 percent increase in live hog imports. Today, live hog imports from China account for over 80 percent of total hog slaughter, making Hong Kong the world's largest importer of live hogs.

COTTON

According to cotton traders in TAIWAN, shipments of Texas cotton from the U.S. West Coast will increase sharply this marketing year, reflecting the lifting of a requirement by importers to ship on Taiwan-flag vessels. As a result, more U.S. carriers are expected to participate in cotton exports and reduce delays experienced because of vessel requirements. The total freight rate for Texas cotton through the West Coast is about 1 cent per pound less than from Gulf ports.

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Substantial recovery in ITALY's imports of U.S. cotton is expected due to several signed contracts specifying shipment of it--primarily of California origin--prior to late July. However, overall recovery of the Italian textile industry is not expected before the last quarter of 1982.

TOBACCO

In the SOVIET UNION, tobacco production, including Makhorka tobacco, is now estimated at 285,000 tons in 1981, down from earlier expectations because of reduced area and poor growing conditions. Procurements of 327,000 tons had been planned; however, actual procurements are not known. Tobacco area was reported to be 175,000 hectares, 2,000 hectares below the 1980 level. Soviet tobacco production in 1982 is forecast at 294,000 tons from 181,000 hectares.

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JAPAN's tobacco leaf imports for Japan fiscal year 1981 (April 1981-March 1982) are forecast at 81,500 tons, up 14 percent from 1980. The United States is expected to supply 59 percent (48,000 tons) of total imports, compared to 56 percent in 1980. Increased imports of U.S. leaf stem from the good quality 1981 U.S. tobacco crop. Traditionally, tobacco imports by the Japan Tobacco and Salt Public Corporation (JTS) have fluctuated widely from year to year. However, because of new fiscal constraints, JTS officials expect to have less flexibility in buying tobacco in the future and imports are likely to be more stable.

Japanese manufactured tobacco production during Japan fiscal year 1981 is expected to remain at about the 1980 level of 303 billion cigarettes and 22 million cigars. Japan's leaf consumption in 1980 was 234,000 tons.

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WEST GERMANY's leaf tobacco consumption increased slightly in 1981 to about 161,000 tons, as cigarette sales rose marginally. U.S. leaf tobacco represented nearly one-fourth of this amount. However, the U.S. share of West Germany's consumption has been declining and, based on leaf exports in 1981 and thus far this year, could dip to nearly 20 percent for 1982.

The strength of the dollar, the quality of recent U.S. tobacco crops, and higher U.S. leaf prices have affected West German demand for U.S. tobacco. Tax and consequent price increases expected to occur in June could reduce cigarette sales during the last half of this year.

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Latest estimates from the SOVIET UNION place 1981 cigarette output at roughly 368 billion pieces, slightly above the previous year's total of 364 billion, but nearly 4 percent below 1977's record high output of 382 billion pieces. Cigarette output at this level indicates higher leaf tobacco imports in 1981 to offset a substantial shortfall in the Soviet tobacco crop last year.

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Soviet leaf imports have risen recently (83,400 tons in 1980, compared with 66,500 tons in 1979), as have cigarette imports (58.1 billion in 1980 compared with 57.2 billion in 1979).

Bulgaria and India were the leading Soviet suppliers of leaf tobacco, with 47 percent and 28 percent shares, respectively, in 1980. Bulgaria and Yugoslavia together supplied more than 90 percent of Soviet cigarette imports that year.

HORTICULTURAL AND TROPICAL PRODUCTS

Mint oil production in SELECTED COUNTRIES for 1981 is estimated at 6,762 tons, compared with 6,930 tons in 1980. The United States remained the leading mint oil producer (1,901 tons of peppermint oil and 966 tons of spearmint oil) in 1981. Declining area was partly offset by improved yields as total production was down only 6 percent from 13 percent smaller area.

Chinese mint oil production is estimated at 1,800 tons, mostly cornmint oil. Paraguay's cornmint oil production reached its peak in 1979 at 1,352 tons and declined to an estimated 1,000 tons in 1981 as a result of higher production costs and more favorably priced competing crops. Brazil's declining production of cornmint oil has traditionally been grown on virgin lands and, as these became scarce, mint production moved to Paraguay. The decline in Brazilian production appears to have slowed, as 1981 production is estimated at 700 tons, unchanged from the 1980 level.

Japan produces about 50 tons of mint oil annually, except in 1980, when the crop was damaged by heavy rains. Italy also produces about 50 tons of peppermint oil annually in the fertile Piedmont plain and Po delta. Mint oil production in 1981 in selected countries is as follows in tons:

Country	Peppermint Oil	Cornmint Oil	Spearmint Oil	Total
United States	1,901	0	966	2,867
China	70	1,600	130	1,800
Paraguay	0	1,000	0	1,000
Brazil	0	700	0	700
Argentina	0	125	0	125
Japan	0	48	0	48
India	2	100	1	103
Italy	50	0	0	50
USSR	60	0	0	60
Taiwan	0	7	0	7
Australia	1	0	0	1
Morocco	0	0	0	1
Total	2,085	3,580	1,097	6,762

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Although officials in CHINA have targeted tea exports as a major foreign exchange earner, increased supplies have been made available domestically to counter shortages, particularly of medium qualities. The domestic market consumes roughly two-thirds of total production, which was estimated at about 320,000 tons in 1981. During the past 3 years, demand has risen sharply, limiting any increase in exports.

Chinese tea shipments averaged in excess of 100,000 tons over the past 3 years, making it the third largest exporter behind India and Sri Lanka. Exports are divided almost equally between black and green teas. China's major market for black tea is England, while Morocco takes most of its green tea.

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The PHILIPPINE Government increased domestic sugar prices March 9 to help sugar producers meet rising production costs, including wage benefits for sugar workers. The liquidation price paid by the Philippine Sugar Commission (PHILSUCOM) for raw sugar produced for the domestic market was raised to the equivalent of $316 per ton from $211. The retail price for refined sugar increased to 22.9 cents per pound from 18.2 cents. Brown sugar will sell at about 17 cents, up from 13 cents. Retail price increases were effective immediately, while the new liquidation price was made retroactive to Feb. 1, 1982.

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The International Development Association (IDA) is planning to propose a credit of $20 million to SRI LANKA for a tea rehabilitation and diversification project. The project aims to reduce tea production costs, to improve quality from high potential tea areas, and diversify unprofitable low-yielding tea lands out of tea and into spices and fuelwood. The project also involves soil conservation programs, tea factory renovation, improved tea transport services, improved housing, water supplies and medical facilities for workers, and technical assistance to improve management and financial control systems.

RECENT FOREIGN AGRICULTURE CIRCULARS

The Current USSR Grain Situation, FG 7-82
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Broilers and Eggs Led Increase in U.S. Poultry Exports in 1981, FPE 1-82
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TO ORDER, CONTACT: U.S. Department of Agriculture, FAS Information Services Staff, 5918-South, Washington, D.C. 20250. Tel. (202) 447-7937.

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Sugar Import Notice
14-82

STATUS OF U.S. SUGAR IMPORT QUOTAS

Washington, August 24 -- The Foreign Agricultural Service of the U.S. Department of Agriculture today reported that preliminary U.S. Customs Service data show sugar imports under quota for the week ending August 20 totaled 19,979 short tons.

Cumulative imports under quota for the July 1-September 30 quota period now total 282,781 short tons. The quota for the third quarter of calendar year 1982 was established at 420,000 tons.

U.S. Customs preliminary data on a country-by-country basis follows:

Country	Weekly total Week ending Aug. 20	Cumulative July 1-Aug. 20	Quota Allocation July 1-Sept. 30
	(Short tons, raw value)		
Argentina	---	18,060	18,060
Australia	---	---	34,860
Belize	---	3,662	4,620
Brazil	---	18,461	60,900
Canada	---	4,620	4,620
Colombia	---	10,080	10,080
Costa Rica	---	3,263	6,300
Dominican Rep.	---	73,920	73,920
Ecuador	---	---	4,620
El Salvador	---	362	10,920
Guatemala	---	556	20,160
Guyana	---	177	5,040
Honduras	---	4,200	4,200
Jamaica	---	---	4,620
Mauritius	4,478	4,478	4,620
Mozambique	---	---	5,460
Nicaragua	---	8,618	8,820
Panama	---	12,180	12,180
Peru	---	17,194	17,220
Philippines	---	55,949	56,700
South Africa Rep.	9,621	9,621	9,660
Swaziland	---	6,720	6,720
Taiwan	---	---	5,040
Thailand	5,880	5,880	5,880
Others	---	24,780 1/	24,780

1/ Filling the "others" category were Barbados 1,030 tons, Bolivia 8,347 and Fiji 15,403.

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CCC AMENDS GUARANTEES TO THAILAND

WASHINGTON, Sept. 14--Commodity Credit Corporation (CCC) under its Export Credit Guarantee Program (GSM-102) today approved a transfer of $1.1 million in guarantees from sales of U.S. soybean meal to sales of cotton to Thailand, according to Glenn D. Whiteman, acting general sales manager for the U.S. Department of Agriculture's Foreign Agricultural Service.

This change will increase authorized guarantees for sales of cotton from $6 million to $7.1 million, and will use all of the guarantees previously earmarked for sales of soybean meal.

A balance of $1.8 million in guarantees is now available to U.S. exporters for cotton sales.

To be eligible for up to three-year coverage, U.S. exporters must submit an application along with a guarantee fee to CCC before export is completed. All shipments must be completed by Sept. 30, 1982.

The guarantee rates include a charge to provide for a per annum interest rate coverage of up to 8 percent on the guaranteed value. Exporters may apply for a guaranteed value up to a maximum of 98 percent of the port value.

Based on semiannual repayments of principal, plus accrued interest, the fee rate is 15.6 cents per $100 for six months; 23.4 cents per $100 for one year; 39.3 cents per $100 for two years; and 56.5 cents per $100 for three years.

Based on equal annual repayments of principal, plus accrued interest, the fee rate is 32.9 cents per $100 for one year; 50.1 cents per $100 for two years; and 69.2 cents per $100 for three years.

For further information, call Lorraine Potts (202) 447-3224.

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PR-154-82

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CCC GUARANTEES TO PORTUGAL INCREASED

WASHINGTON, Aug. 13 -- The Commodity Credit Corporation (CCC) today approved a $75 million increase in guarantees to U.S. exporters for sales of U.S. agricultural commodities to Portugal under the Export Credit Guarantee Program (GSM-102), according to Melvin Sims, general sales manager for the U.S. Department of Agriculture's Foreign Agricultural Service. CCC will provide up to three-year coverage under the line to Portugal.

Sims said the $75 million increase is in addition to the $350 million in guarantees that was announced earlier for Portugal. CCC will earmark the entire $75 million in new guarantees for feed grain sales (barley, corn, sorghum, and oats).

The guarantee line to Portugal now totals $425 million and authorizes $240 million for feed grains, $125 million for oilseeds, and $60 million for wheat.

To be eligible for guarantees, U.S. exporters must submit an application along with a guarantee fee to CCC before export is completed. All shipments must be completed by Sept. 30, 1982. The guarantor is Caixa Geral Depositos Credito e Prevedencia and/or other eligible banks.

The guarantee rates include a charge to provide for a per annum interest rate coverage of up to 8 percent on the guaranteed value. Exporters may apply for a guaranteed value up to a maximum of 98 percent of the port value.

Based on semiannual repayments of principal, plus accrued interest, the fee is 15.6 cents per $100 for six months; 23.4 cents per $100 for one year; 39.3 cents per $100 for two years; and 56.5 cents per $100 for three years.

Based on equal annual repayments of principal, plus accrued interest, the fee rate is 32.9 cents per $100 for one year; 50.1 cents per $100 for two years; and 69.2 cents per $100 for three years.

For further information, call Lorraine Potts (202) 447-3224.

PR 126-82

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USDA REPORTS SEPTEMBER STATUS FOR CCC GUARANTEE PROGRAM

WASHINGTON, Sept. 15 --The U.S. Department of Agriculture has a balance of approximately $971 million worth of guarantees available under authorized lines to U.S. exporters under the Commodity Credit Corporation (CCC) Export Credit Guarantee Program (GSM-102), which provides protection against payment defaults without any distinction between commercial and noncommercial reasons, according to Glenn D. Whiteman, acting general sales manager for the U.S. Department of Agriculture's Foreign Agricultural Service.

As of Sept. 10, guarantee balances remaining under the GSM-102 program by commodity and country were:

BARLEY MALT: Jamaica, $454,190.

BEANS, (Red): Panama, $1.6 million.

CORN: Panama, $3 million; Nigeria, $12.1 million; Peru, $10 million.

CORN, (White): Costa Rica, $141,500.

COTTON: Korea, $215.3 million; Indonesia, $15 million; Thailand, $1.8 million.

FEED GRAINS: Korea, $24.2 million; Portugal, $83.6 million; Jamaica, $245,200; Mexico, $54 million.

GLUTEN, CORN: El Salvador, $775,800.

GRAINS, COARSE (Corn and Oats): Dominican Republic, $1.4 million.

LENTILS: Panama, $1.4 million.

LUMBER (Softwood): Uruguay, $2 million; Colombia, $1 million; Venezuela, $4 million.

MEALS (Meat and/or Bone): El Salvador, $308,800.

OILSEEDS, (Cottonseed, Soybeans, Peanuts, and Sunflowerseed): Portugal, $18.9 million.

ONIONS: Panama, $1.2 million.

POTATOES (Seed): Venezuela, $2 million.

BROILER AND/OR LAYER CHICKS: El Salvador, $53,170.

POULTRY (Frozen): Nigeria, $4 million.

POULTS, TURKEY: El Salvador, $50,000.

PROTEIN MEALS (Cottonseed, Linseed, Soybean, and Sunflowerseed): Costa Rica, $1.7 million; Dominican Republic, $4.3 million.

SOYBEAN MEAL: Nigeria, $1 million.

RICE: Peru, $40 million; Dominican Republic, $1 million; Jamaica, $256,700; Nigeria, $54.6 million.

SOYBEANS: Korea, $11.4 million; Dominican Republic, $6.7 million.

SOYBEANS AND/OR VEGETABLE OILS (Cottonseed, Soybean, Linseed, Peanut, and Sunflowerseed): Guatemala, $4 million.

TALLOW: Korea, $201,700; El Salvador, $1.7 million; Guatemala, $10 million.

TALLOW AND/OR YELLOW GREASE: Jamaica, $1.3 million.

TOBACCO (Unmanufactured): Nigeria, $600,000; Sierre Leone, $250,000; Jamaica, $43,700.

VEGETABLE OILS (Cottonseed, Peanut, Soybean, Linseed, and Sunflowerseed): Dominican Republic, $858,600; Morocco, $50 million; Peru, $3.8 million; Pakistan, $32.5 million; Mexico, $11 million.

WHEAT: Korea, $35.6 million; Peru, $54.7 million; Portugal, $5 million; Morocco, $88.7 million; Brazil, $70.4; Costa Rica, $301,900.

WHEAT FLOUR AND/OR SEMOLINA: Nigeria, $593,700.

UNDESIGNATED: Korea, $20 million.

For further information, call Lorraine Potts (202) 447-3224.

PR-155-82

Rotterdam Prices and E.C. Import Levies:

Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	April 6, 1982		Change from previous week	A year ago
	$ per m. ton	$ per bu.	¢ per bu.	$ per m. ton
Wheat				
Canadian No. 1 CWRS-12.5%.....	202.00	5.50	-5	1/
U.S. No. 2 DNS/NS: 14%........	187.50	5.10	-2	206.00
U.S. No. 2 DHW/HW: 13.5%......	201.00	5.47	-8	206.00
U.S. No. 2 S.R.W..............	169.00	4.60	-16	192.00
U.S. No. 3 H.A.D..............	182.00	4.95	-13	240.00
Canadian No. 1 A: Durum.......	195.00	5.31	-21	1/
Feed grains:				
U.S. No. 3 Yellow Corn........	132.50	3.37	+4	163.00
U.S. No. 2 Sorghum 2/.........	140.00	3.56	+6	168.00
Feed Barley 3/................	148.75	3.24	0	173.00
Soybeans:				
U.S. No. 2 Yellow.............	266.25	7.25	+27	315.75
Argentine 4/..................	264.00	7.18	+24	313.00
U.S. 44% Soybean Meal (M.T.)..	233.00	--	0 5/	271.00
EC Import Levies				
Wheat 6/......................	84.75	2.31	-1	77.00
Barley........................	74.70	1.63	+4	63.60
Corn..........................	90.40	2.30	+3	76.50
Sorghum.......................	80.05	2.03	+2	71.75

1/ Not available.
2/ Optional delivery: Argentine Granifero Sorghum.
3/ Optional delivery: Canadian Feed Barley.
4/ Optional delivery: Brazil Yellow.
5/ Dollars per metric ton.
6/ Durum has a special levy.

Note: Basis May delivery.

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